JOB AID

Monitoring and Approving Transactions in ARC

Workflow in ARC is different than it was with our legacy systems, i.e. AP/CAR. In ARC, the initiator of a transaction does not choose the approver for the transaction to route to; workflow automatically determines where a transaction is routed for departmental approval. Depending on your School/Admin Unit business process, you may want to insert an Adhoc approver into workflow. An Adhoc approver is in addition to, not a replacement for, the approvers that workflow automatically routes transactions to. Initiators are therefore encouraged to monitor the approval status of their transactions to ensure that they route through workflow in a timely manner.

Monitoring Voucher Approval Status

To determine where a voucher is in the approval workflow, you can review the approval history using the following navigation: Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry. Use the 'Find an Existing Value' to search for a specific voucher. Review the voucher's Approval Status from the Summary tab and click the 'Approval History' hyperlink to view all the approvers (Departmental, Ad Hoc, Central) the transaction has been routed to. From this screen you will be able to determine which approver is next in line for approval. Follow up with approvers as needed, reminding them that the recommended way to manage transactions requiring approval is to access ARC'S custom approval search pages (see below).

Monitoring Requisition Approval Status

To determine where a requisition is in the approval workflow, you can review the approval history using the following navigation: Main Menu > eProcurement > Manage Requisitions. Find your requisition(s) on this page and choose 'View Approvals' from the Select Action dropdown box located to the right of the requisition.

Guidance for Approving Procurement Transactions – ARC's Custom Approval Pages and your Worklist

Depending on your approval roles in ARC, you may have a large number of transactions in your Worklist. Since a transaction can route to multiple approvers, it can be hard to determine which transactions you need to approve from a business process standpoint. The best way to determine transactions pending your approval is to use ARC's custom approval pages. Use the following navigations to access these custom approval search pages which allow users to search for pending approvals by common categories such as: Origin (Originating Department), Vendor, and Dollar Amount.

- Requisition: eProcurement > Manage Requisition Approval
- Change Order: Purchasing > Purchase Order > Approve POs
- Voucher: Accounts Payable > Vouchers > Approve > Approval Framework – Vouchers

Approvers can still use their Worklist in ARC to review and approve transactions. Click here for a job aid providing guidance on how to manage Worklists. However, please note that your Worklist is not searchable in the same way that the custom approval pages are. We therefore recommend you always use the custom approval search pages when needing to identify specific transactions awaiting your approval.